

# Town of Whitman: Strategic Plan: 2022-2027

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Town of Whitman  
Board of Selectmen

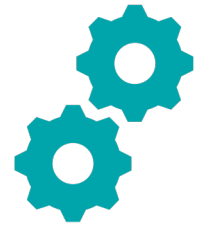
February 15, 2022

# Town of Whitman Strategic Plan



- A disciplined effort that **produces fundamental decisions and actions** that shape and guide what an organization is, who it serves, what it does, and why it does it, focusing on the future.
- **Articulates where an organization is going, and the actions needed to make progress and how it will know if it is successful.**

# Governance & Management Tool



- ✓ sets priorities
- ✓ focuses energy and resources
- ✓ strengthens operations
- ✓ ensures that elected and appointed officials, department heads, employees and other stakeholders are working toward common goals
- ✓ establishes agreement around intended outcomes/results over a defined period of time
- ✓ can be assessed and adjusted in response to a changing environment

# Implementation



- **Communicate**
  - Share strategic priorities with stakeholders
- **Incorporate strategic priorities throughout Town government**
  - Everyone contributes
- **Track and report progress**
  - Quarterly, annually



# Town of Whitman Strategic Plan: 2022-2027



## **Whitman Board of Selectmen**

Carl F. Kowalski, Chairman  
Daniel L. Salvucci, Vice Chairman  
Brian J. Bezanson, Clerk  
Randy G. LaMattina, Jr.  
Justin R. Evans

Lincoln Heineman  
Town Administrator

## Letter from the Town Administrator



February 2022

I am pleased to present the Town of Whitman's 2022-2025 Strategic Plan on behalf of the Board of Selectmen. The plan serves as a roadmap for Whitman to grow and prosper and reflects the input of our citizens, Board of Selectmen, Department Heads, elected and appointed officials.

The Board of Selectmen began the strategic planning process in Fall 2021 to set a clear path for Whitman's future. As a result, Whitman has a newly established vision, mission, and value statements, five strategic priorities, and specific strategies to achieve these goals over the next five years.

Informed by the Town's FY 2021-FY 2025 Capital Improvement Plan, a town-wide citizen survey, previous studies, interviews with the Board of Selectmen and Department Heads, the planning process culminated in a day-long strategic planning retreat attended by the Board of Selectmen, Whitman School Committee members, Finance Committee members, commission members, Department Heads, and citizens.

The success of this plan will be a collaborative effort, and I look forward to working with everyone to achieve our goals for the citizens of Whitman.

Respectfully,

*Lincoln D. Heineman*

Lincoln D. Heineman  
Town Administrator

# Town of Whitman: Vision, Mission & Values



## *Mission:*

To provide responsible, sustainable services by fostering strong community relationships for our citizens, future citizens, and visitors.

## *Vision:*

A welcoming, collaborative community that values its history to ensure a successful future.

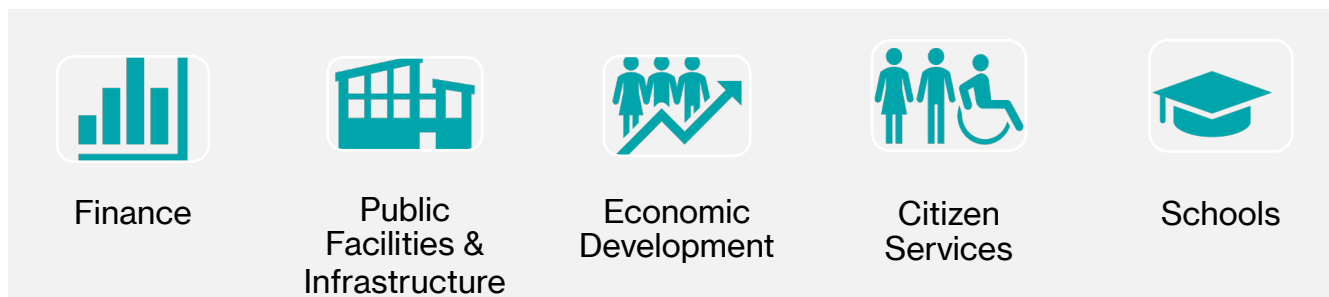
## *Values:*

Sustainable, supportive, respectful, participatory government.

As adopted by the Whitman Board of Selectmen, November 9, 2021.






# Strategic Priorities: 2022-2027

- Strategic priority areas were identified in **five focus areas**:



- The following **strategic priorities, accompanying initiatives, and outcomes** provide a framework to guide implementation, evaluate, and track progress over time.

# Town of Whitman 2022-2027 Strategic Priorities, Initiatives and Five-Year Outcomes

FOCUS AREA	STRATEGIC PRIORITY	INITIATIVES	FIVE-YEAR OUTCOMES
<b>Finance</b> 	<b>1. A financial strategy that delivers the level of services that citizens expect.</b>	<ol style="list-style-type: none"> <li>1. Financial policy development</li> <li>2. A process to inform when and how much new revenue is needed</li> <li>3. Accurate financial and capital forecast</li> <li>4. Enhanced communications with all educational partners</li> </ol>	<ul style="list-style-type: none"> <li>✓ Stabilized budgeting</li> <li>✓ Financial policy document</li> <li>✓ Consistent tax rate</li> <li>✓ Growth in beneficial services</li> <li>✓ Public buy-in</li> <li>✓ Collaboration &amp; communication strategy with educational partners</li> </ul>
<b>Public Facilities &amp; Infrastructure</b> 	<b>2. Public facilities and community infrastructure that meet the needs of citizens and town employees.</b>	<ol style="list-style-type: none"> <li>1. New DPW building</li> <li>2. Professional assessment of ongoing facility maintenance needs</li> <li>3. Completed sewer main</li> <li>4. Downtown infrastructure improvements</li> <li>5. Underground utilities</li> <li>6. High-speed internet</li> </ol>	<ul style="list-style-type: none"> <li>✓ Data to inform capital plan needs</li> <li>✓ Infrastructure to support downtown economic development opportunities</li> <li>✓ Improved sanitation</li> <li>✓ Fewer injuries and improved working conditions</li> </ul>
<b>Economic Development</b> 	<b>3. Encourage responsive and innovative growth.</b>	<ol style="list-style-type: none"> <li>1. Enhance downtown infrastructure</li> <li>2. Community engagement &amp; communication of benefits &amp; trade-offs</li> <li>3. Establishment of a Chamber of Commerce or business association</li> <li>4. Competitive MassWorks application submittal</li> </ol>	<ul style="list-style-type: none"> <li>✓ Better informed policy-making boards and commissions</li> <li>✓ Attractive downtown</li> <li>✓ New business development and employment opportunities</li> <li>✓ Taking steps to meet the State's affordable housing goal of 10%</li> </ul>
<b>Citizen Services</b> 	<b>4. Improve citizens' experience of interacting with their government.</b>	<ol style="list-style-type: none"> <li>1. Ensure all services are accessible</li> <li>2. Utilize available resources (grants, ARRA)</li> <li>3. Foster citizen engagement</li> <li>4. Enhance citizen communication</li> </ol>	<ul style="list-style-type: none"> <li>✓ Increased citizen participation in town government</li> <li>✓ Increased utilization of town services</li> <li>✓ Improved information &amp; communication</li> </ul>
<b>Schools</b> 	<b>5. Provide a high-quality education that promotes student success and responsible citizenship for all students.</b>	<ol style="list-style-type: none"> <li>1. Early childhood ed (with free full-day kindergarten)</li> <li>2. Robust related arts (K-8)</li> <li>3. Pre-K to 12 curricula that are aligned &amp; fosters student learning for all</li> <li>4. Maintain a safe &amp; secure learning environment both physically &amp; online</li> </ol>	<ul style="list-style-type: none"> <li>✓ Lifelong student success</li> </ul>



# 1. Finance

A financial strategy that delivers the level of services that citizens expect.					
INITIATIVES					
1. Financial policy development	2. A process to inform when and how much new revenue is needed	3. Accurate financial and capital forecast		4. Enhanced communications with all educational partners	
FIVE-YEAR OUTCOMES					
✓ Stabilized budgeting	✓ Financial policy document	✓ Consistent tax rate	✓ Growth in beneficial services	✓ Public buy-in	✓ Collaboration & communication strategy with educational partners
KEY STAKEHOLDERS					
Board of Selectmen	Board of Assessors	Citizens	Finance Committee	Capital Committee	
PROCESS HOLDERS					
Board of Selectmen	Town Administrator		School Committee	School Superintendent	



## 2. Public Facilities & Infrastructure

**Public facilities and community infrastructure that meet the needs of the citizens and town employees.**

### INITIATIVES

1. New DPW Building	2. Professional Assessment of ongoing facility maintenance needs	3. Completed Sewer Main	4. Downtown infrastructure improvements	5. Underground utilities	6. High speed internet
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### FIVE-YEAR OUTCOMES

✓ Data to inform capital plan needs	✓ Infrastructure to support downtown economic development opportunities	✓ Improved sanitation	✓ Fewer injuries & improved working conditions
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### KEY STAKEHOLDERS

Board of Selectmen	Public Works Commission	Citizens	School Committee	Capital Committee
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### PROCESS HOLDERS

Town Administrator	Board of Selectmen	Facilities Manager	Superintendent of Water/Sewer	Public Works Commission	Superintendent of Highway/Parks/Trees
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### 3. Economic Development

Encourage responsive and innovative growth.						
INITIATIVES						
1. Enhance downtown infrastructure	2. Community engagement & communication of benefits & trade-offs	3. Establishment of a Chamber of Commerce or business association	4. Competitive MassWorks application submittal			
FIVE-YEAR OUTCOMES						
✓ Better informed policy-making boards and commissions	✓ Attractive downtown	✓ New business development and employment opportunities	✓ Taking steps to meet the State's affordable housing goal of 10%			
KEY STAKEHOLDERS						
Board of Selectmen	Planning Board	Citizens	Zoning Board of Appeals	Conservation Commission	Historic Commission	Building Department
PROCESS HOLDERS						
Town Administrator	Superintendent of Highway/Park/Tree			Building Commissioner		



## 4. Citizen Services



**Improve citizens' experience of interacting with their government.**

### INITIATIVES

- |                                       |   |                              |                                  |
|---------------------------------------|---|------------------------------|----------------------------------|
| 1. Ensure all services are accessible | 2. Utilize available resources (grants, ARPA) | 3. Foster citizen engagement | 4. Enhance citizen communication |
|---------------------------------------|---|------------------------------|----------------------------------|

### FIVE-YEAR OUTCOMES

- |  |  |  |
|--|--|--|
| ✓ Increased citizen participation in town government | ✓ Increased utilization of town services | ✓ Improved information & communication |
|--|--|--|

### KEY STAKEHOLDERS

Board of Selectmen

Citizens

Department Heads

### PROCESS HOLDERS

Town Administrator

Community Liaison

Board of Selectmen



## 5. Schools

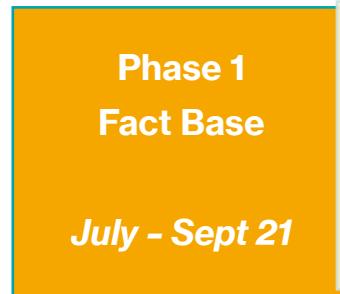
Provide a high-quality education that promotes student success and responsible citizenship for all students.			
INITIATIVES			
1. Early childhood ed (with free full-day kindergarten)	2. Robust related arts (K-8)	3. Pre-K to 12 curricula that are aligned & fosters student learning for all	4. Maintain a safe & secure learning environment both physically & online
FIVE-YEAR OUTCOMES			
✓ Lifelong student success			
KEY STAKEHOLDERS			
Citizens/Parents	School Committee	School Administration	Board of Selectmen
PROCESS HOLDERS			
School Superintendent		School Committee	

# Appendix

- Strategic Planning Process: Phases
- Opportunities & Challenges
- Interview Participants
- Strategic Planning Retreat Attendees
- Strategic Priority Tracking Tool



## Strategic Planning Process: Phases



**Review existing data sets:** community survey, HPP, Capital plan  
- ID new data inputs: current factors and trends e.g., Covid-19  
- Review of comparable municipality plans  
**Stakeholder Interviews:** Citizens, Selectmen, Whitman School Committee representatives, Department Heads, Town Administrator



### 10/23/21 Strategic Planning Retreat

- 1) Review key findings
- 2) Vision, Mission, Values
- 3) Organizing themes
- 4) Goals & objectives
- 5) Outcome measures: short, medium, & long-term
- 6) Resources required

### 11/22/21 Department Head Strategic Planning Session

- Alignment of strategic priorities with department goals



- Synthesize data/information & draft plan
- 11/9/21 Board of Selectmen vote to adopt Mission, Vision, & Values statements
- 2/15/22 Strategic Plan Presentation to the Board of Selectmen
- Communication strategy: internal & external

# Opportunities & Challenges

As part of Phase 1, the Town's opportunities and challenges were identified by the Board of Selectmen and Department Heads. The summary on the following two pages is organized into six categories:

- 1) General
- 2) Citizen Services
- 3) Economic Development
- 4) Finance
- 5) Public Facilities and Infrastructure
- 6) Schools





Opportunities		Challenges
<p><b>General</b></p> 	<ul style="list-style-type: none"> <li>Consensus on the Town's larger policy goals               <ul style="list-style-type: none"> <li>Clarity about major areas we want to improve and what we want to achieve</li> </ul> </li> <li>Creating a statement of values, identifying what is important to the community</li> <li>Sharing of ideas and providing input into the development of strategic plan</li> <li>Town employees have a connection to the town and are dedicated               <ul style="list-style-type: none"> <li>All are good at their jobs</li> </ul> </li> <li>Improving interdepartmental communications</li> <li>Professional development for town employees and orientation for new employees</li> <li>Town could reach out to the many people the community who would like to volunteer in city departments</li> <li>Better utilization of the Town Hall auditorium for community programming</li> </ul>	<ul style="list-style-type: none"> <li>Town pay scale is low, as compared other towns, challenging <u>recruitment</u> and retention of public sector professionals in light of impending retirements               <ul style="list-style-type: none"> <li>Lack of succession planning for professional positions</li> </ul> </li> <li>Missing strategic priorities</li> <li>Not consulting with Town departments on policy changes that have operational ramifications</li> <li>The pandemic and resulting statutes, standards, and reporting</li> <li>Opioid crisis</li> <li>Bringing together of siloed studies and <u>taking action</u></li> <li>Housing affordability and impact on seniors and first-time homebuyers</li> <li>Emphasizing civility - people are intimidated to attend and participate in public meetings thereby impacting inclusivity and diversity of opinion</li> </ul>
<p><b>Citizen Services</b></p> 	<ul style="list-style-type: none"> <li>Technology to better serve the taxpayers               <ul style="list-style-type: none"> <li>Making transactions with government easier and providing more transparency</li> <li>Online permitting and bill pay</li> </ul> </li> <li>Promote Council on Aging programming to employed people and younger seniors to serve more citizens               <ul style="list-style-type: none"> <li>early evening programs – not just day programs</li> </ul> </li> <li>Developed new, cost-effective, online library programming during the pandemic attracting new patrons through Zoom               <ul style="list-style-type: none"> <li>Providing additional library hours – additional nights and Saturdays</li> </ul> </li> <li>Consolidating technology with the Regional School District and other towns</li> <li>Conducting a comprehensive technology analysis improve cost savings and efficiency</li> </ul>	<ul style="list-style-type: none"> <li>Don't have professional departments where other communities have a FT professional i.e., facilities/municipal buildings, planning, building department</li> <li>Smaller departments are considered lower budget priorities yet still require additional funding to provide services citizens expect               <ul style="list-style-type: none"> <li>i.e., library not eligible for state aid</li> </ul> </li> <li>In need of additional tech/help desk staffing and social media specialist to keep the website up to date</li> <li>Rate of growth, resulting in increased demand on public safety services</li> <li>Water and sewer rate increases</li> <li>Police Dept. shift cuts               <ul style="list-style-type: none"> <li>Police reform issues= resulting in requiring auxiliary volunteers attend training for full time standards, losing volunteers</li> <li>IT demands of PD are overwhelming and there is only one IT person for the town</li> </ul> </li> </ul>
	<ul style="list-style-type: none"> <li>Whitman is part of the Southeastern Mass. Law Enforcement Council – regionalization enhances response for search and rescue, SWOT, crowd control and provides monthly training</li> <li>Town now has outsourced billing</li> <li>Making better use of Civic Plus to ensure comprehensive, up to date information for citizens</li> </ul>	
<p><b>Economic Development</b></p> 	<ul style="list-style-type: none"> <li>Revitalization of downtown               <ul style="list-style-type: none"> <li>More people working from home, positive impact on downtown economic development, available licenses to support additional commerce</li> </ul> </li> <li>MBTA station smart growth Zoning Overlay District incentive funding</li> <li>Moving developers to create more affordable housing and reaching the 10% goal</li> <li>Park Street School site</li> <li>Adopting the Community Preservation Act – CPA</li> </ul>	<ul style="list-style-type: none"> <li>Town is not in compliance with affordable housing requirements, susceptible to 40 B</li> <li>Amending the zoning around the MBTA so town is eligible for smart growth redevelopment zoning</li> </ul>
<p><b>Finance</b></p> 	<ul style="list-style-type: none"> <li>Centralize large procurement</li> <li>To provide enough money through free cash to have more opportunities</li> <li>CARES funding, \$1.5M reimbursement, and new funding from ARPA</li> <li>Developing a concrete, sustainable financial plan</li> </ul>	<ul style="list-style-type: none"> <li>Lack of sustainable funding strategy and budget with an eye toward the future</li> <li>Cost of education has ballooned so other departments put their needs on the back burner to meet the education requirement</li> <li>Navigating budget constraints considering increasing costs and capital project needs</li> <li>Clearly explaining to all citizens why a budget override is necessary and how citizens will benefit, what it means for them– public education is lacking               <ul style="list-style-type: none"> <li>Taxpayers are not well educated about budget needs</li> <li>Need to communicate the facts</li> </ul> </li> <li>Residential tax rate is among the lowest comparable peers, too dependent on residential taxpayers               <ul style="list-style-type: none"> <li>Lack industry to contribute to the tax base and offset growing expenses</li> </ul> </li> <li>Running the town and maintaining at a level that taxpayers can afford, particularly older community with fixed incomes</li> <li>Maintaining the level of service that citizens are accustomed to in all departments</li> </ul>

<p><b>Public Facilities &amp; Infrastructure</b></p> 	<ul style="list-style-type: none"> <li>• New DPW building will help operations</li> <li>• Better utilization of existing facilities for programming</li> <li>• Upgrade of water and sewer system <ul style="list-style-type: none"> <li>◦ Loop water mains so there is more than one feed</li> </ul> </li> <li>• Renewable energy</li> <li>• Improvements to Fire Department facilities</li> <li>• Park Street School site</li> </ul>	<ul style="list-style-type: none"> <li>• More community space is needed for programming – community center</li> <li>• Very poor condition of DPW building</li> <li>• Middle School renovation</li> <li>• Maintaining and upgrading pump stations replacing water mains, collection stations, upgrading pipes <ul style="list-style-type: none"> <li>◦ Currently no storage capacity if Silver Lake broke – no ability to help ourselves</li> </ul> </li> </ul>	
<p><b>Schools</b></p> 	<ul style="list-style-type: none"> <li>• Collaboration between the regional school district and the town <ul style="list-style-type: none"> <li>◦ Having the Schools and Town on the same page with the School District's top three goals</li> </ul> </li> <li>• Park Street School site <ul style="list-style-type: none"> <li>◦ Special Education</li> <li>◦ Early childhood education</li> </ul> </li> <li>• Getting technology in the hands of all students – Chromebooks</li> <li>• CARES funding</li> <li>• Universal all-day kindergarten</li> </ul>	<p><b><i>School Committee</i></b></p> <ul style="list-style-type: none"> <li>• Distrust in school administration <ul style="list-style-type: none"> <li>◦ Restoring the credibility of the district after assessment issue was challenged</li> </ul> </li> <li>• Communication and openness with the Board of Selectmen</li> <li>• Unfunded state mandates</li> <li>• Capital needs in schools: buildings, tech, vehicles, Middle School project</li> <li>• Getting on the right financial footing: figuring out what we can do, need to do</li> <li>• Lack of education equity compared to other towns – no full day K without paying for it, creates disparities in early education</li> </ul>	<p><b><i>Board of Selectmen</i></b></p> <ul style="list-style-type: none"> <li>• Receiving timely, up-to-date information from regional school district to make better informed financial decisions, information sharing</li> <li>• School district's lack of communication, transparency, and willingness to lay everything out on the table</li> </ul>
		<ul style="list-style-type: none"> <li>• Older, retired residents don't understand why they should support full day K (they had to pay for their kids) <ul style="list-style-type: none"> <li>◦ Making the case</li> <li>◦ Need data points i.e., kids that go out of district for services, costs the district</li> <li>◦ Need to advocate, reach out so people understand that if we don't invest in our children, we won't have a future.</li> </ul> </li> <li>• Restoring foreign language program and adding "real world" initiatives to better prepare students</li> <li>• Kids in the 9-16 age range don't have activities are safe place to go after school if they aren't involved in sports – youth or community center</li> </ul>	

# Interview Participants

## Board of Selectmen

- Carl F. Kowalski,  
*Chairman*
- Daniel L. Salvucci,  
*Vice Chairman*
- Justin R. Evans
- Randy G. LaMattina, Jr.

## Whitman School Committee Members

- Dawn Byers
- David Forth
- Christopher Scriven
- Fred Small
- Beth Stafford

## Department Heads

- Mary Beth Carter,  
*Collector Treasurer*
- Robert Curran,  
*Building  
Commissioner*
- Timothy Clancy,  
*Fire Chief*
- Michael Ganshirt,  
*Asst. Town Clerk*
- Timothy Hanlon,  
*Chief of Police*
- Lincoln Heineman,  
*Town Administrator*
- Mary Holland,  
*Council on Aging*
- Kathleen Keefe,  
*Principal Assessor*
- Daniel Kelly,  
*Health Inspector*
- Ken Lytle,  
*Town Accountant*
- Josh MacNeil,  
*Information  
Technology Director*
- Dennis Smith,  
*Superintendent,  
Water/Sewer*
- Dawn Varley,  
*Town Clerk*
- Marcie Walsh-O'Connor,  
*Library Director*
- Kathleen Woodward,  
*Recreation Director*



# 10/23/22 Strategic Planning Retreat Attendees

- Rick Anderson, Finance Committee Chair
- Dawn Byers, School Committee Member
- Rosemary Connolly, Community Member
- Bob Curran, Building Commissioner
- Justin R. Evans, Selectman
- Lincoln Heineman, Town Administrator
- Shawn Kain, Community Member
- Dan Kelley, Health Inspector
- Carl F. Kowalski, Chairman, Board of Selectmen
- Marie Lailer, Chair, Historical Commission
- Randy G. LaMattina, Jr., Selectman
- Sara Lansing, Veteran's Services Director
- Josh MacNeil, Information Technology Director
- John Noone, Community Member
- George Porter, Chair, Conservation Commission
- Chris Scriven, School Committee Member
- Fred Small, School Committee Member
- Dennis Smith, Water/Sewer Superintendent
- Jeff Szymaniak, Superintendent of Schools
- Ryan Tressel, Community Member
- Marcie Walsh-O'Connor, Library Director
- Kathleen Woodward, Recreation Director

# Strategic Priority Tracking Tool

## Example

Strategic Priority	Reporting Period:		Initiatives	Status	Progress Towards 5-Year Outcome – Key Metrics
	YR	QTR			
1. A financial strategy that delivers the level of services that citizens expect.			1.		
			2.		
			3.		
			4.		
2. Public facilities and community infrastructure that meet the needs of citizens and town employees.			1.		
			2.		
			3.		
			4.		
			5.		
			6.		
3. Encourage responsive and innovative growth.			1.		
			2.		
			3.		
			4.		
4. Improve citizens' experience of interacting with their government.			1.		
			2.		
			3.		
			4.		
5. Provide a high-quality education that promotes student success and responsible citizenship for all students.			1.		
			2.		
			3.		
			4.		